

Training and Technical Assistance for Energy Weatherization

Request for Proposal 2011-RFP-19

CSD Teleconference 3/3/11 at 2pm

RFP Attendees:

Kimberly Mosley- KMS Consulting – Advertising as a Sub seeking client

Michael Vargas – Atlas Project Support

Tom Conlon- GeoPraxis Inc.

Peter Noland- RHA

Pam Gorsuch- RHA

CSD Staff:

James Kirk, Dennis Gilliam, Jeff Eastburn, Kathy Andry, Leslie Campanella, Linda Goddard, Abigail Churchill, Steve Lempke

Linda (CSD) - Housekeeping Regarding RFP Submittal

Pg. 9 Minimum Qualifications for Proposers – Accepted or non-responsive look at qualifications carefully.

Pg. 14 – Key Action Dates- Written Deadline for written questions due by 2pm March 8th. All responses returned in writing by Email by 2pm on March 11. Final date for bid proposal is March 18th at 5pm.

Pg. 15 – All proposals must be sealed, one original and three copies. mark do not open, use heading as stated in RFP, please remember to include the suite number.

Pg. 26 – Required attachments- all need to be included in the package as well as signed. Cost proposal must be filled out and signed. All those attachments are important especially cost proposal and bidder declaration.

Kathy (CSD) - Introduction

Purpose of RFP is to secure a Contractor to provide general technical assistance services to CSD, training services and offering some research assistance. To assist in technical questions from providers as well as to clarify any requirements concerning our Weatherization Assistance Program (WAP). To assist in a variety of technical research projects such as new developments

that are emerging in respect to energy efficiency measures, helping us interpret audit standards, building codes, and State and Federal requirements. Also to help CSD on special projects, such as tank-less water heater pilot projects to see if they are an applicable measure for the weatherization program. Maybe to look at solar projects and also to assist CSD with identifying training needs of our providers; developing training curriculum, and delivering the training. Typical training sessions would cover diagnostic training, combustion and safety appliance safety, health and safety, measure, installation, inspection and assessment training. The contractor will also help CSD monitor and evaluate the training centers throughout the state.

Leslie (CSD) - Prior Questions

1. How does CSD plan envision organizing, prioritizing the task assigned to the contractor?

CSD will have an initial work plan meeting to prioritize short term and long term goals. However that work plan will be adjusted as new projects or issues arise or are identified.

2. a. What is the anticipated volume of training for the contract period?

b. Is there an estimated quantity of students and classes etc.?

We will need to analyze historical data and provide that information to you once completed.

c. Are there prescribed locations for field training?

No. It is done regionally and could happen anywhere and any number of places based on the type of training, and upon availability. It could also be at each individual agency.

3. a. What is the anticipated volume of technical assistance requests?

Again, we will need to analyze historical data and provide that information to you once completed.

b. What is the primary form of contact? Email? Phone? In-person? Etc.?

All of the above. There is no primary form it could be any of them.

4. Will CSD be coordinating the training requests or will the contractor be responsible for handling all aspects of training, scheduling and coordination with the local providers?

It is a shared function, however, it will fall primarily on the contractor to perform that function.

5. What is the anticipated ramp up time for contractors to become competent enough with program requirements and standards to effectively deliver field training to local providers and to revise and add to the current curriculum?

It would be 45 days. It is our expectation because our needs are immediate.

6. Will the contractor need to be competent with federal energy auditing tools and will the contractor need to provide training to local providers?

Yes, we currently have two energy audit tools we are just rolling out. They are REM Design and TREAT. REM Design is used for the single family homes, mobile homes and small mud projects. TREAT is used for large MUD projects. We currently have a couple of agencies using TREAT, and are required to use that particular auditing tool. They are currently contracting it out. Training needs for TREAT would be minimal but REM Design you would have to have.

OPEN FLOOR

1. A number of your questions were addressing information that might need to be available prior to bid ending, number of potential training sessions etc. Exactly how would you expect to receive a detailed enough proposal to address that?

Leslie-CSD- When we post the questions and answers those answers will be made available on March 11th.

2. Sub seeking prime – In general the prime contractor would need to meet all of the requirements. Is there any part of this proposal that could be partially bid? Meaning that if you did not meet all of some aspects of the requirements, you could bid just on the areas that your firm has expertise to deal with some of the scope of work items. The scope of work is rather large and I would suspect that the prime would be subcontracting some of the work.

Linda-CSD- Yes the bidder must meet all the minimum qualifications however you can list yourself as a sub and any prime could list you as a subcontractor in their bid submission.

They would contact me to?

Linda- CSD- Yes they would contact you to see if you would be a sub that they would be interested in submitting and it would be included within their submittal. You would list yourself as a sub on bidsync.

3. On page 8 you reference the electronic data collection, I am generally familiar with the existing materials that have been developed. I was wondering if you have that material assembled in a content management system for long term update management. And if not, if that is within the scope of this RFP to develop best practice content management to make sure that CSD's content and curricula and practices are maintained at the highest level potential level of quality?

Linda-CSD- That is not included in this RFP but if there is a firm that thinks there is something they can do that would be of interest and beneficial we would be happy to look at it in the bid submittal.

In that section on Electronic Data collection reporting requirements there are some approved electronic CSD formats for the visit summary reports, monitoring reports, activity reports etc. My understanding is that the current format for most of these is Excel spreadsheets?

Leslie- CSD- That is correct or hard copies. When we talk about approved format, the contractor would prepare a format and CSD could approve it during the contract term.

4. This pertains to federal audit tools, TREAT and REM Design. Are there any current plans to have these audit procedures line up with California Energy Commission HERS Phase II standards?

Leslie- CSD- These energy audit tools, even though these are on DOE's pre-approved list we still have to do extensive study and analysis and submit to DOE to get their approval. That would require a lot of work for us to make any changes in that regard. We just went through that process and we are required by DOE to get our energy audit tools re-approved every five years.

This is Federal oversight so the Federal tools that govern in this scenario?

Leslie-CSD-Actually the Feds have NEAT which we used previously and was developed by the DOE but the other two are not. They are commercial audit tools.

We do have clarity from the Feds for use of REM Design and TREAT for the next five years?

Leslie- CSD-Yes

5. Will you be definitely awarding on this bid? What would be the conditions or situations that would cause this bid not to be awarded?

Linda- CSD- If we do not get any submissions or if the submissions received are non-responsive. We are moving forward and we do not foresee any issues regarding that.

You are pretty confident that you will have enough responses to draw from and award the bid?

Linda-CSD- That is a great question and we certainly wish we could answer. We are certainly hopeful.

6. What indirect costs should be included in a training daily rate? If that would be any printed materials for training, software or equipment rentals or any other incidentals costs that need to be included in a separate rate or as included in the regular rates?

Leslie- CSD- There is only two rates. It would need to be all inclusive as the other rate is just technical assistance.

Linda (CSD) - Closing Remarks

You do have until March 8, 2pm, to submit any further questions via email. This is on page 14 to email directly to me and we will post on our website, bidsync and email directly as well as responses on March 11th 2pm.